

innate resource manager

matching people and work



User Guide
for Microsoft Project Add-in
for Project Managers

RM/MSP Add-in/UG/01

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About the guide

The purpose of this user guide is to enable project managers and planners to apply changes and updates to their resources in their Microsoft Project plans using the Microsoft Project Add-in component of the Innate Resource Manager system.

The illustrations in this guide use Microsoft Project 2003 and Innate Resource Manager 4.53 though other versions of Microsoft Project behave in a similar way.

It is important to understand the cycle of events in the development and life of a project plan. Against this background, the guide explains how to set up and use the Add-in, to avoid errors, to understand and review the results in the plan and to correct mistakes. An understanding of Microsoft Project and its tracking fields and calculations is helpful. Good practices are recommended.

Following the instructions

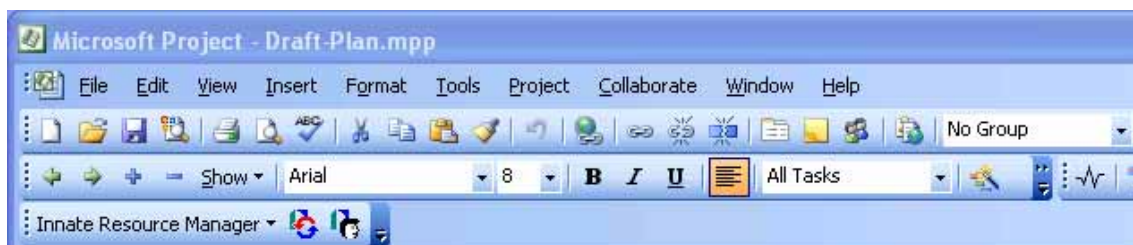
Instructions for using the software are written in numbered steps, as shown below, and must be followed in the correct sequence otherwise you may not get the expected results.

- 1 Follow the steps in order.

Useful general tips and information are displayed in a box.

Managing resources with Innate and the Microsoft Project Add-in

Essentially, when all an organisation's resources' (people's) work is planned and scheduled, you gain an overview of what people are doing, what skills are being used, how much the work is costing, what performance levels are being achieved, how many hours are being worked and answers to many other important questions. This works only when all the information is consistent, stored centrally and up-to-date.



The Add-in has its own toolbar, above.

Innate Resource Manager provides the database, Resource Server, and an interface for tasks and assignments to be entered into it: resource managers use the web browser to access the database. When planners or project managers build plans using Microsoft Project, it's essential to keep

resources consistent and to keep the plans synchronized with information in the database and this is what the Add-in does.

Your starting point as a project manager can be the plan or the central database. You can begin building your project from a new project file, from a template or a copy of a library plan or you can create it from tasks already entered in the database from Innate Resource Manager. The project manager is the only person authorised to change the plan from Microsoft Project. The project's resource manager is the only person authorised to change the project in the database.

Below, you can search for the resource who's the best match for your task and find out if he or she is available.

Replace Resource

Replace: Group: ACCOUNTANT Resource: Harry Hunt

Find Now Options Cancel

Name: (any) Skill: Must be ACCOUNTANT

Location: Prefer (any) Role: Prefer (any)

Languages: Must be French Grade: Prefer (any)

Include: Available and busy resources

Assign Show Assignments

	Name	Skill	Other Skills	Languages
■	Myra Milton	ACCOUNTANT	PROGRAMMER,TESTER	French,Italian
■	Joe Jordan	ACCOUNTANT	PROGRAMMER,TECHNICIAN	French
■	Harry Hunt	ACCOUNTANT	ANALYST,PROGRAMMER	French
■	Chris White	PROGRAMMER	TESTER,ACCOUNTANT	French,Italian,Spanish

The Innate Microsoft Project Add-in also enables you to synchronize the resource data in your plan with the resource data in the central database, the Innate Resource Server. This means that resource managers and other users of the database can run reports and make authorised changes to your resource assignments using the latest information. Your plans and their reports are accurate, complete and as up-to-date as possible. Using the Add-in means that resource information can be updated centrally, for example, when people change their roles, skills or join or leave the projects, and names and other resource details are maintained in a consistent way, avoiding errors, duplication and mis-spelling which can cause confusion and inaccuracy.

If you are to understand the application of the Innate Microsoft Project Add-in, it's useful if you understand the Innate Resource Manager system and a typical planning process.

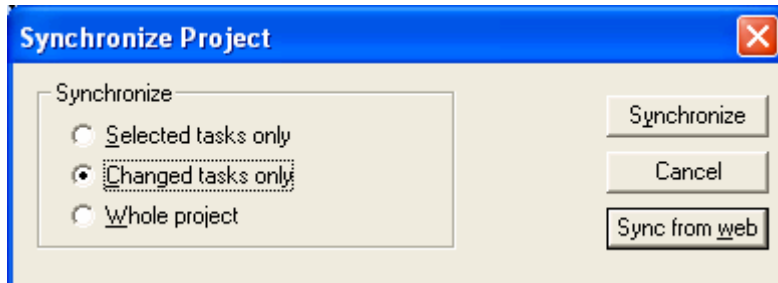
If you are building the plan from a blank new project, check that it has the correct settings for the working time calendar, non-working days and the length of the working day and other features before you start adding tasks. If your project is inconsistent with these settings, you will get unexpected results and resources may not be available without becoming overloaded.

The Add-in does not affect any tools or features of Microsoft Project.

What the Add-in does

The Add-in enables you to make sure the web plan in the database and the Microsoft Project plan are exactly the same. It also enables you to search for the best resource who's available to do the work on your tasks.

Below is the simple dialog for the Synchronize Project options.

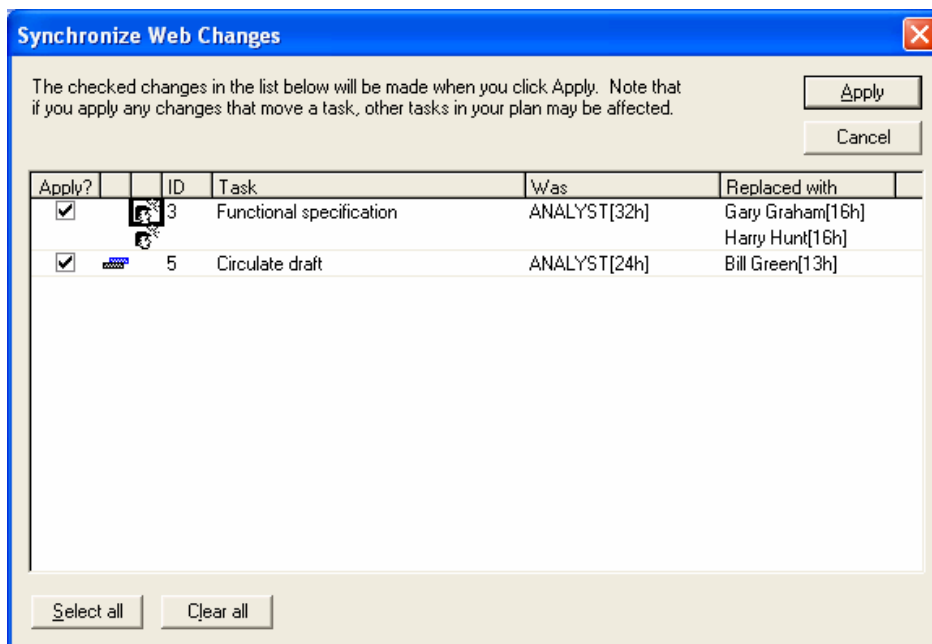


When your project's resource manager makes changes in the web database, your plan needs to be updated to show these changes. This is called synchronizing from web, "sync from web".

When you make changes in your Microsoft Project plan, the web database needs to be updated. This is called synchronizing, or "sync".

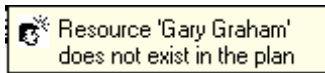
When you open your project, you should always sync from web as your first action. As you make changes to the plan, you can sync – send your changes to the web database – as you make the changes or when you finish using Microsoft Project.

When you sync from web, you'll see the Synchronize Web Changes dialog displaying changes, if there are any, and you can choose to apply them to your plan or not. An important point is that the project manager has ultimate control over the plan and can defer applying the changes, although this means that the plan does not match the database.

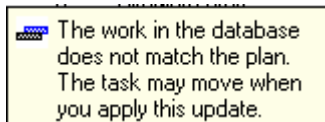


Indicator icons appear next to each individual update, as shown in the example above.

You can see a label explaining the icon when you place your cursor on it, such as these, below:

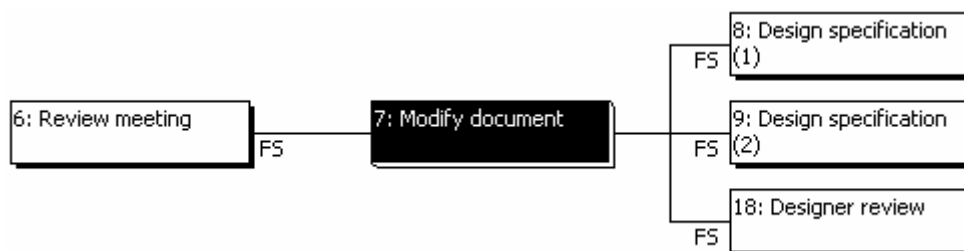


If the resource does not already exist in your plan, the resource's name is added to the resource list after the change has been applied.



When the total work value of a changed assignment is different from that in the plan, applying the change may cause the task to be re-scheduled (earlier or later). This can cause succeeding tasks to be re-scheduled, too.

Linking tasks in Microsoft Project

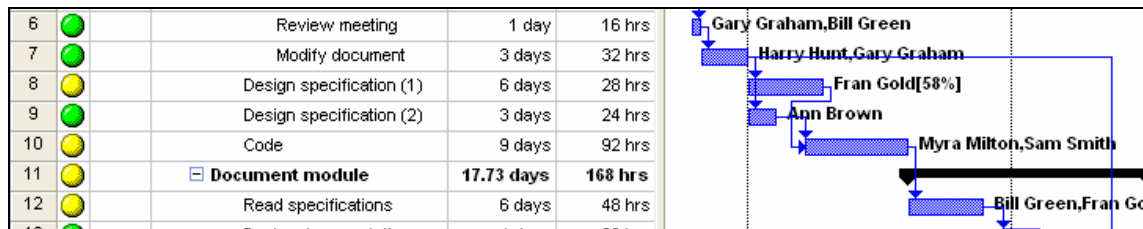


Above, Microsoft Project's Relationship Diagram view shows that task 7, highlighted, has one preceding task and three succeeding tasks. A line drawn between any two task boxes indicates a relationship or dependency between those two tasks.

FS means that each relationship between the tasks is Finish-Start, that is from the Finish date of the preceding task to the Start date of the succeeding task.

If task 7 were to take longer – by having more work added or having fewer resources doing the work – then tasks 8, 9 and 18 might be scheduled to start later. The re-scheduled dates are calculated by Microsoft Project: the dates can be affected by constraints and deadlines on the updated tasks and by their links to other, non-updated tasks which have constraints or deadlines.

Links are shown in the standard Gantt Chart view, as follows.



When you have entered a date for a task's start or finish, this is stored as a Constraint date and this can affect whether and how the dates of an individual task are re-calculated. You can tell when a task has a constraint because an icon appears in the indicator field, as shown below.



If work is added to a task or to an individual assignment with the effect of making the task take longer, the task's successors (linked to the Finish of the task) may be delayed.

If work is removed or more resources are doing the same work in a shorter time and the task finishes earlier, succeeding tasks may be started earlier.

It's a good idea to link tasks in Microsoft Project if you are not already doing so because then you harness its power to calculate how one change can lead to more changes in your schedule instead of having to estimate dates yourself.

How does the Add-in affect my plan?

When you run the Add-in and choose sync from web, the Add-in displays the Synchronize Web Changes dialog and applies the changes you select.

These can include:

- Adding a new assignment to an existing task.
- Deleting an assignment.
- Replacing an assignment with a different resource.
- Changing an assignment from one to several resources or from several to one resource.
- Changing the (remaining) work.

If you have deleted a task in your plan and the task still exists in the database, you must synchronize from your plan to the web to ensure that the task is deleted in the database. If you do not do this, the next time you sync from web, your deleted task might be recreated. The deleted task will continue to show in Resource Manager reports.

Components of the plan and some terms explained

A **project** is a group of tasks which must be completed within a specified time in order to achieve defined objectives. A project has a start and a finish date. Each project can have a priority value which determines its importance in relation to other projects.

A **task** is an activity, a component of the plan which must be achieved in order to complete a part of the project. A task has a start and a finish date or deadline - the date by which the task must be finished. A task is finished or completed by resources who are assigned to work on the task. More than one resource can be assigned to a task. Resources do not necessarily work at the same rate or at the same time on the task. All work on the task occurs between the task's start and finish dates.

A **resource** is the named person available to work on tasks. Work can be measured in hours, days or "heads". Each resource has an availability or a number of hours per week when the person is available to work. A resource is not necessarily available or scheduled to work consecutive periods of time on a task.

When a resource has time available to work on a new task, the resource is "available".

When a resource is working on a task and has not enough time available to take on more work, the resource is "busy".

When a resource has too much work, more than can be done in the time available, the person is "overloaded" or "overallocated".

A **generic resource** is an unnamed person, that is, a skill or team name which can be used as a place-holder in the plan. Generic resources are useful when you don't know who is going to do the work (yet) because they have not been assigned, or when the team leader or person in a similar role has several people who can share work and he or she is prepared to schedule the named team member on a day-to-day basis. Generic resources enable you to maintain the correct total of "work-days" and to show what skills are required and not yet assigned on future tasks.

When a resource is given a task to do, this is called **an assignment** and is measured in hours or days or as a proportion of a person's daily work. An assignment has a start and finish date. A task can have several resources assigned to it: they do not all have to do the same amount of work at the same time. It is easiest to plan when each task has only one resource assigned to do the work.

Baseline dates are the dates agreed and saved as the original planned start and finish dates of the project. You can also save the original planned cost and total work estimate for the project as baseline values. These values are (usually) not changed throughout the life of the project. The baseline can be compared later with the actual start and finish dates, work and cost of the project in order to review the accuracy of the original plan. Analysing baselines at the end of a project can enable you to improve your project planning and estimating and so improve your projects' performance in the future. The baseline is usually saved after the project has been scheduled.

About template plans

Basing your project plan on a template saves you time, in lots of ways.

The template is an ordinary Microsoft Project plan which is usually set up with background information to ensure that everyone's plans are consistent. Typically the calendar or working hours are already entered which means that everyone starts with the same basic working hours. When lots of plans are put together, as the Innate system does, they are all set against the same calendar so resource availabilities are consistent and you can compare resource usage and capacity across all projects accurately.

Your template can be set up to contain special tables, views, reports and filters which will save you time and keep everyone's Microsoft Project views and reports looking the same and therefore easier to communicate and compare with others.

Template plans can be set up with resources already assigned to tasks to save time: typically the resources used in this case are generic.

Trouble-shooting – calendars and working hours

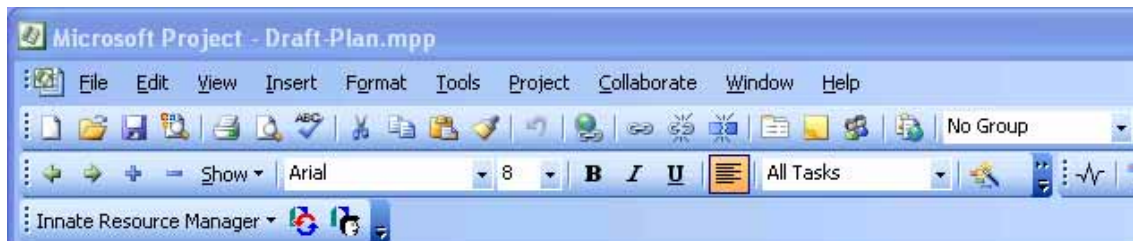
Microsoft Project plans default to an eight-hour working day, Monday to Friday. If your resources in the database have a different working calendar, especially if it has a shorter working day, it is likely that no resource can be found to do the work in the plan.

It is very important to make sure that Microsoft Project plans (and templates) have the correct working hours set up under Tools, Change Working Time.

Different individuals and groups of resources can have their own working hours and holiday calendars in Innate Resource Manager and in Microsoft Project.

Innate Resource Manager toolbar

If you are making a Microsoft Project plan from a template, follow your organisation's instructions to do this before starting to use the Add-in.



When you open Microsoft Project, you should see the Innate Resource Manager toolbar, as shown below:



If you do not see the toolbar, follow these instructions:

- 1 Open the View menu and choose Toolbars.
- 2 Choose Innate Resource Manager.
- 3 Check that you can see the Innate toolbar.

If you cannot see the toolbar, check with your system administrator that the Innate Client (the Add-in) has been installed correctly.

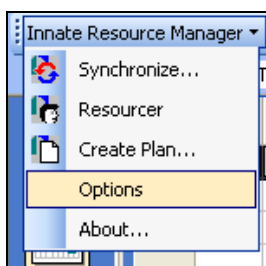
The Innate Resource Manager pull-down enables you to use the tools, Synchronize and Resourcer, which also have their buttons on the toolbar, to create a plan from a project originating in the Resource Server and to set up the connection between Microsoft Project and the Resource Server, the web.

Getting started using the Add-in

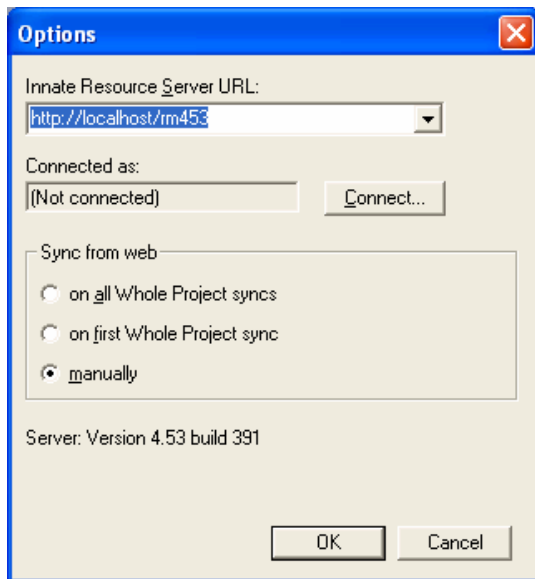
Follow these steps to link your Microsoft Project plans to the database.

Note that the user name must be the name which is entered in the database as the project manager for this plan: check that you are using the correct spelling and format – Ann Brown or Brown Ann, for example.

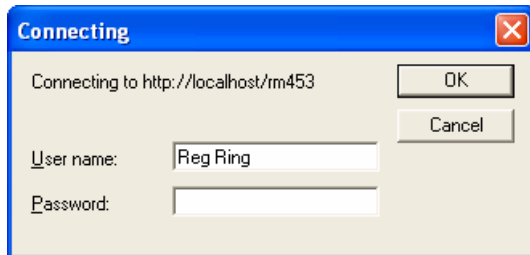
- 1 Open your Microsoft Project plan.
- 2 Open the Innate Resource Manager pull-down and choose Options.



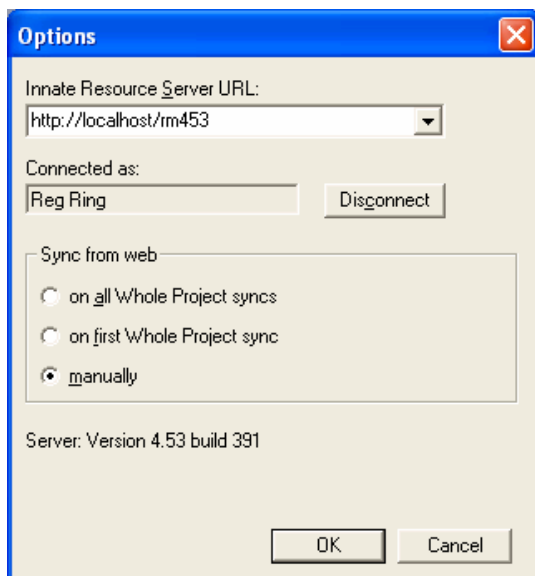
- 3 In the Options dialog, if there is no URL, type the URL of your Innate Resource Server.



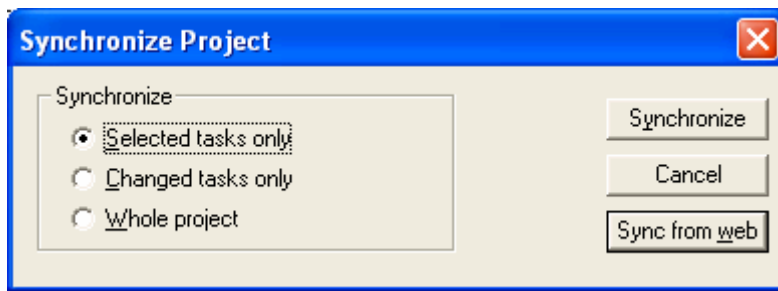
- 4 If there is no name in the Connected as: box, click the Connect button.



- 5 In the Connecting dialog, type your user name in the User name box and enter your password, if you have one. Click OK.
- 6 Click OK on the Options dialog to close it.



About the Synchronize Project dialog



The Synchronize Project dialog enables you to:

- Get changes to your plan from the web (Sync from web)
- Send selected tasks' changes to the web (Synchronize)
- Send all changed tasks' changes to the web (Synchronize)
- Send the whole project to the web (Synchronize)

Use the Cancel button to close the dialog without carrying out any action.

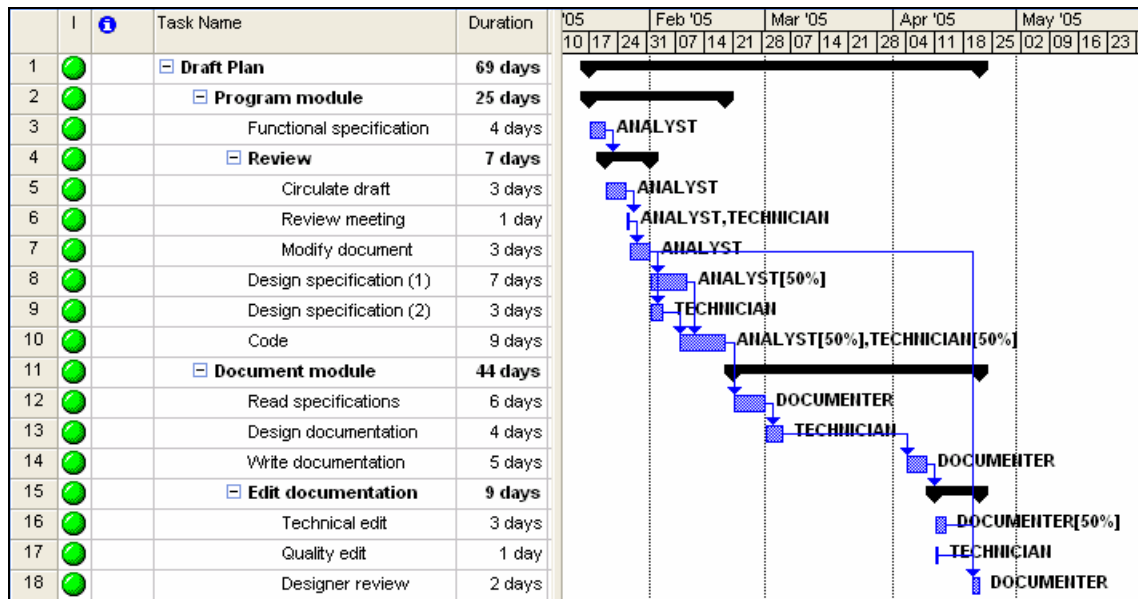
There is no undo button. When you have synchronized in either direction, you cannot undo the action, however you can discard changes to your Microsoft Project plan by closing it without saving it. It's a good idea to save your plan before you synchronize.

Note that sync from web always applies to the whole project and selecting tasks or clicking the changed tasks only button has no effect.

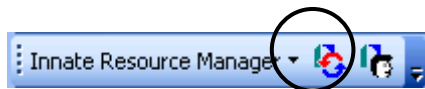
Synchronizing with the database – when you open the plan

Follow these steps to synchronize your project with the Resource Server, the web, before you start using Microsoft Project or the Add-in.

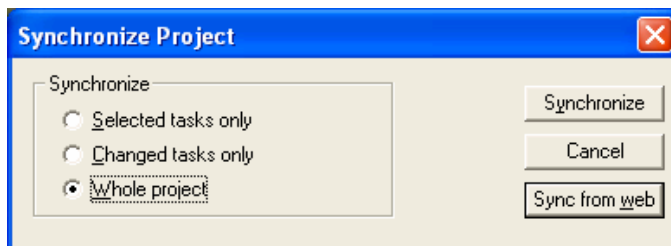
Note: it is very important to synchronize your project with the Resource Server, “sync from web”, before you make any changes or updates to your plan. If you don't sync from web first, any changes you make to your plan may be overwritten when you synchronize from the web later. Sync from web always updates the whole project.



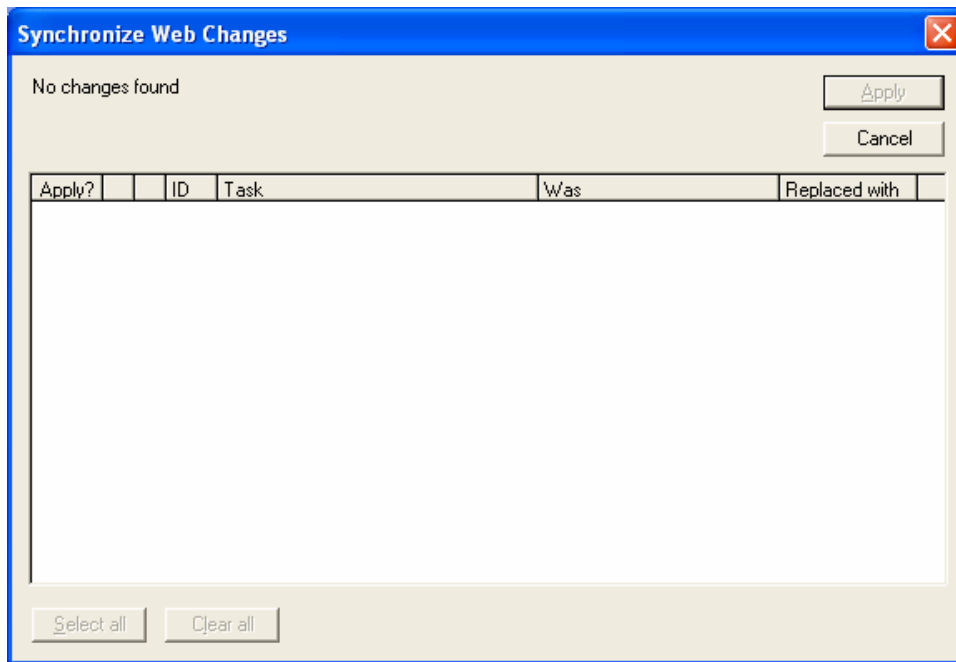
- 1 Use a task view (such as Gantt Chart): on the Innate toolbar click the Synchronize button.



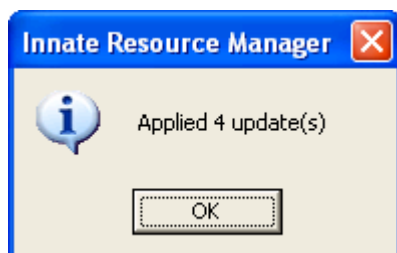
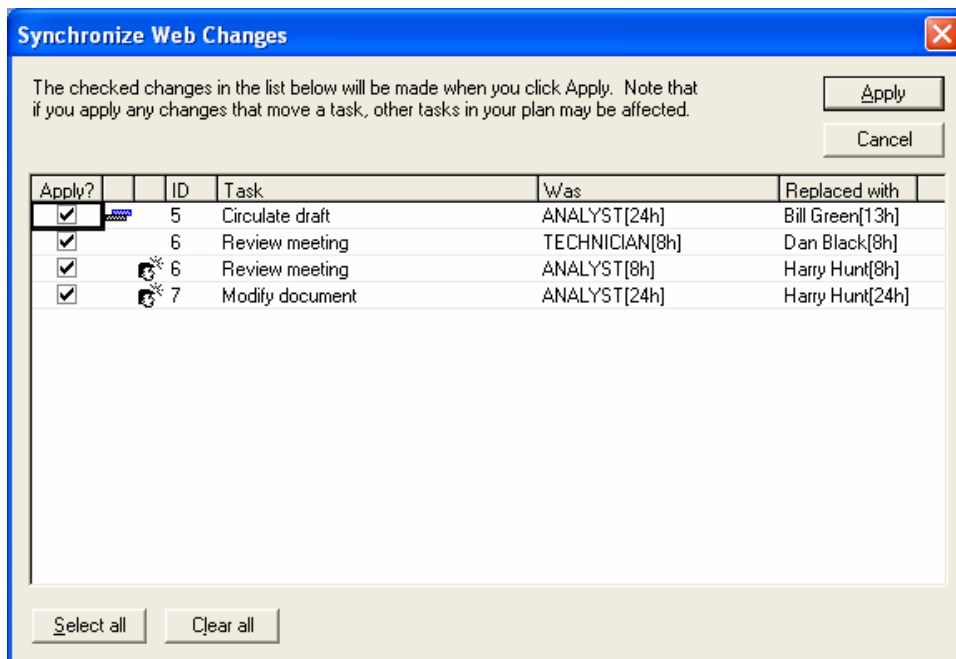
- 2 In the Synchronize Project dialog click Sync from web.



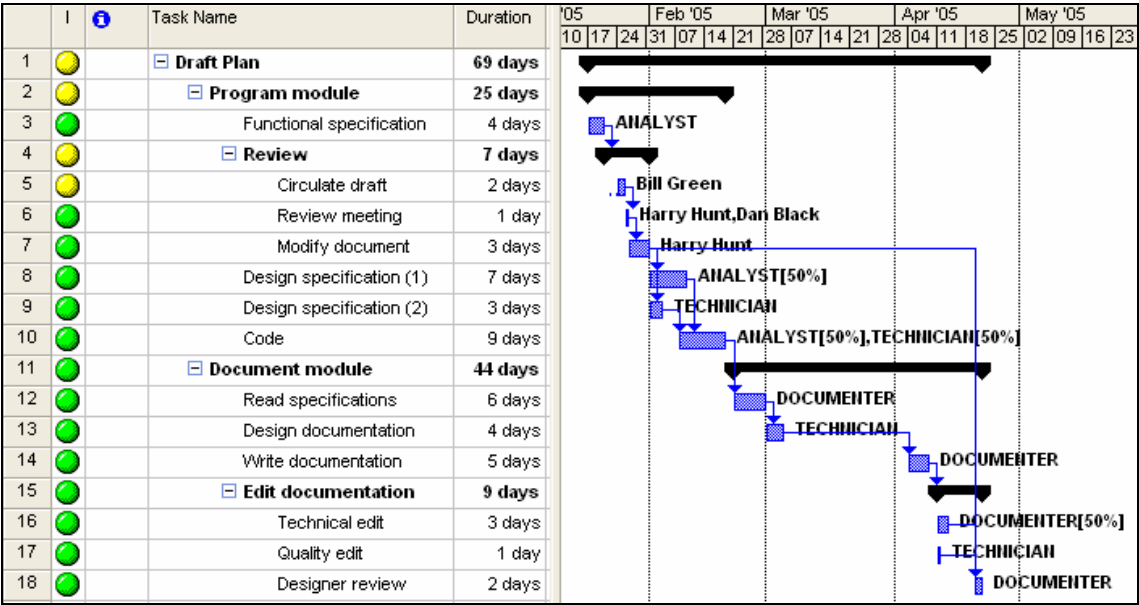
- 3 Check the updates displayed in the Synchronize Web Changes dialog: if there are no changes, the dialog tells you, no changes found. Click Cancel to close the dialog in this case.



- 4 If there are changes, you can apply them all or you can clear the checkboxes next to those updates you don't wish to apply this time. Click in the check box to either clear it or to select it again. Use the Select all or Clear all buttons, if you wish. Click Apply to apply the selected updates and a dialog displays how many updates you have applied.



- 5 Click OK, click Close on the Synchronize Project dialog and check that you can see the coloured indicator buttons next to the ID (row number) column in your plan, similar to those shown below.



If you make assignments using Microsoft Project's Assign Resources dialog, or using any other method, you must synchronize after making the changes because these are only stored locally in your plan.

Graphical indicators, coloured buttons, show you the resource status for each task. The indicator is displayed in task field Text29. You will only see the buttons if your plan is set up correctly, otherwise Text29 shows a text value. Hover your cursor over the button to see the text.

Tip: save your plan in Microsoft Project at regular intervals.

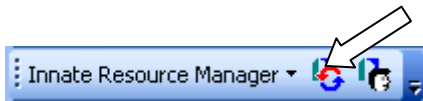
Important: Sync from web displays any updates made to a task in the database since you last performed a sync from web. It does not display assignments which differ because they have changed in the Microsoft Project plan.

Synchronizing changes – sending them to the database

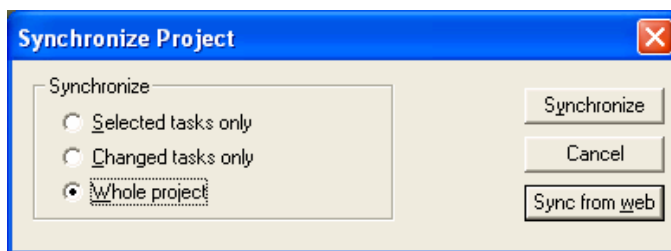
When you have made one or more changes to your plan, send the changes from the plan to the web database.

Which tasks should you synchronize? Synchronizing the whole project is the safest option. Choosing changed tasks means that only those tasks in your plan with yellow buttons will be synchronized – which can be quicker if your project is very large. This is a useful, quick option if your resource manager is working on your tasks, too. You must select the non-green tasks in your plan before synchronizing if you wish to use the Selected tasks option.

- 1 Save your plan.
- 2 Using a task view, such as Gantt Chart, if you wish to synchronize selected tasks, select them. Using the Innate toolbar, click the Synchronize button.



- 3 In the Synchronize Project dialog, choose Selected tasks only, Changed tasks only or Whole project, and click Synchronize.



Assigning a generic resource in Microsoft Project

Generic resources are used as a “place marker” to indicate the skill required by someone who is going to do the work of the task.

Because generic resources are usually available at a level of zero (a resource is normally 100% available), tasks with generic resources assigned to them are always going to be shown as overloaded and described as busy by the search engine. This identifies them as being tasks which need attention and they should have named resources assigned to them. When you replace the generic resource with a real person, you will get a realistic picture of resource usage.

Resources, generic and otherwise, are assigned only to normal tasks, which appear as blue bars on the Gantt Chart. They should not be assigned to milestones (black diamonds) or summary tasks (black lines with a triangle at each end). Although Microsoft Project will allow it, do not assign a resource to a milestone because it should have a zero duration, or to a summary task, when it can lead to double counting.

Project Progresser only updates normal tasks, not milestones and not summary tasks.

Avoid complications and potential duplication by assigning resources only to normal tasks and not to summary tasks or milestones.

Note that these illustrations are for demonstration purposes only and your database may show different field names and values. Your organisation can have different field names and values and use the fields in different ways, of course: the methods described are still applicable.

Adding a new generic resource assignment to a single task

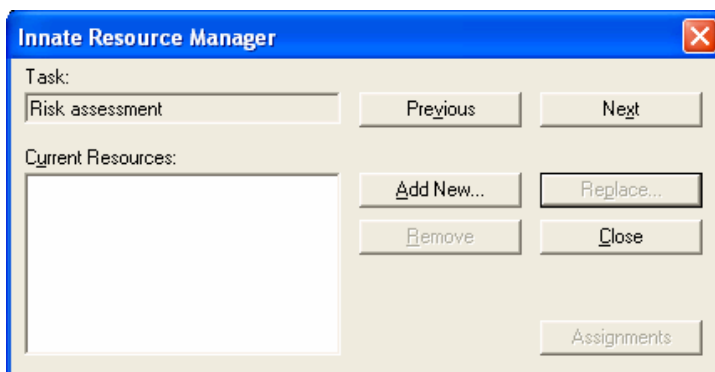
When you want to add a resource assignment to a task, use the Add-in to choose and assign the best matched resource.

If there are already resources assigned to the task, use these steps to add another resource. The task used in the steps below has no assignments so the Replace and Remove buttons are not applicable.

- 1 In Microsoft Project, in the Gantt Chart table, select the normal task (with a blue bar in the Gantt Chart) to which you wish to add a resource.
- 2 Click the Resourcer button on the righthand end of the Innate toolbar .



- 3 In the Innate Resource Manager dialog, click the Add New button.



- 4 In the Add Resource dialog Skill: box, choose Must be. In the Skill pull-down list, choose an appropriate skill name for the resource on this task. Click Find now.

Add Resource

Enter criteria for the resource you want to add and click Find Now.

Find Now Options Cancel

Name: (any) Skill: Must be ANALYST

Location: Prefer (any) Role: Prefer (any)

Languages: Prefer (any) Grade: Prefer (any)

Include: Available and busy resources

Assign Show Assignments

Resources:

	Name	Skill	Other Skills

Add Resource

Enter criteria for the resource you want to add and click Find Now.

Find Now Options Cancel

Name: (any) Skill: Must be ANALYST

Location: Prefer (any) Role: Prefer (any)

Languages: Prefer (any) Grade: Prefer (any)

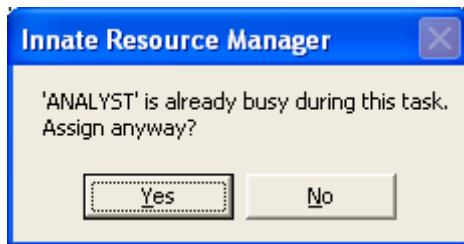
Include: Available and busy resources

Assign Show Assignments

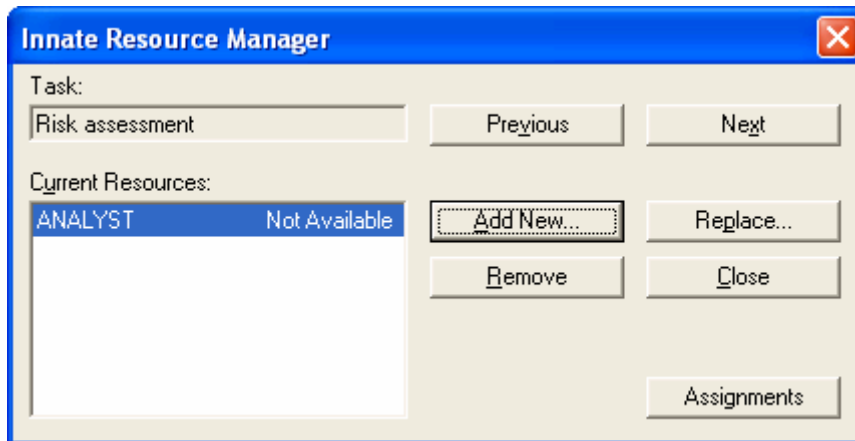
Resources:

	Name	Skill	Other Skills
	Pat Pringle	ANALYST	DOCUMENTER,TECHNICIAN
	Nat Nolan	ANALYST	TESTER,TECHNICIAN
	Larry Lamb	ANALYST	ACCOUNTANT,TECHNICIAN
	Fran Gold	TESTER	ANALYST,TECHNICIAN
	Sam Smith	PROGRAMMER	TECHNICIAN,ANALYST
	Bill Green	TECHNICIAN	PROGRAMMER,ANALYST
	Ann Brown	DOCUMENTER	TESTER,ANALYST
	ANALYST	ANALYST	

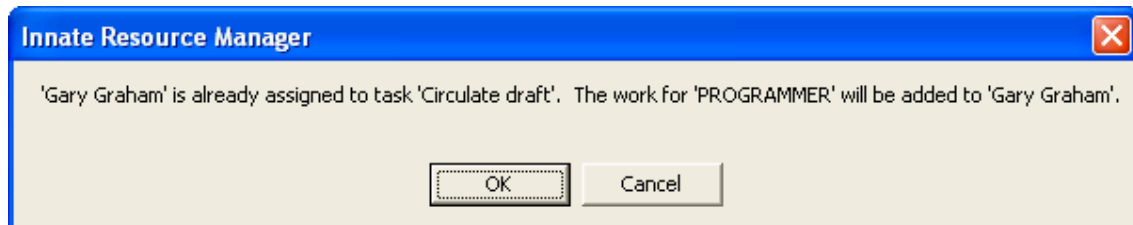
- 5 If you are assigning a generic resource, you'll usually find its name at the bottom of the list, so scroll down, select the name and click Assign. If you are assigning a named resource select the name and click Assign.
- 6 If the resource is already busy, you'll see a dialog like the following example. Click Yes to assign the resource and close it.



7 Click Close or use the buttons to perform another action or move to another task.



Duplicating a resource assignment



When a named resource is assigned to a task, Microsoft Project does not allow you to make a second assignment to the same resource. If, for example, you need to replace the generics PROGRAMMER and ANALYST each working at 50% on the same task, you could assign a named resource with both skills to work 100% on the task, making one assignment.

Note that the task type settings in Microsoft Project will cause different results when you do this.

If the task type is Fixed Work, the resource percentage stays at 50%, the same as the first assignment, and the duration of the task will double when you make the second assignment to the same person: you can change the duration using Microsoft Project after you've made the assignments, if you prefer.

If you wish the task duration not to change, the task type should be Fixed Duration, Effort-driven. See the Advanced tab of the Task information dialog. You can change the task type before you make the second assignment, if you wish.

Removing a resource assignment

Removing a resource means deleting the assignment.

The recommended way to delete an assignment is to use the Add-in and the Remove button. This deletes the resource assignment in your plan and in the database.

Although you can delete a resource assignment using Microsoft Project without the help of the Add-in – you must synchronize the plan afterwards.

Remember to synchronize after you have made changes.

The removed resource name remains in your resource list in your project plan.

If there is only one resource assigned to the task and if the task type is Fixed Work, the Work value remains on the task (insert the column Work in your table if you wish to see this). If the task type is not Fixed Work, the Work value reduces to zero.

Using the Add resource dialog search fields

Replace Resource

Replace:
 Group: ACCOUNTANT Resource: Harry Hunt

Find Now

Options Cancel

Name: (any) Skill: Must be DOCUMENTER

Location: Must be London Role: Prefer PM

Languages: Prefer French Grade: Prefer (any)

Include: Available and busy resources

Assign Show Assignments

Resources:	Name	Skill	Other Skills

The Add resource dialog enables you to search for and add a new resource assignment to one or more tasks or to remove or replace resource assignments. Its actions are performed simultaneously in the plan and the database.

The Find Now button on this dialog searches the database for resources to match your requirements. Make sure you do not refine your search too much because there may be no matches. If you ask for available and busy resources, you can see everyone who has the right skills and you might be able to change your own plans to get preferred person.

The best matched resources are at the top of the list when you've done a search.

You must click Find Now each time you change your search criteria.

The Add-in remembers what you searched on to find this assignment the last time so it shows Must be ANALYST in the Skill field automatically.

Below, this search looked for people with the skill ANALYST whether they were busy or available on 17 and 18 February, the dates of the selected task. You can see the dates when you click the Show Assignments button.

Add Resource

Enter criteria for the resource you want to add and click Find Now.

Find Now

OptionsCancel

Name:
(any)

Skill:
Must beANALYST

Location:
Prefer(any)

Role:
Prefer(any)

Languages:
Prefer(any)

Grade:
Prefer(any)

Include: Available and busy resources

AssignShow Assignments

Resources:

	Name	Skill	Other Skills
	Gary Graham	PROGRAMMER	ANALYST,TECHNICIAN
	Harry Hunt	ACCOUNTANT	ANALYST,PROGRAMMER
	Dan Black	TECHNICIAN	TESTER,ANALYST
	Terry Turner	PROGRAMMER	TECHNICIAN,ANALYST
	Reg Ring	ACCOUNTANT	DOCUMENTER,ANALYST
	Kris King	ANALYST	ACCOUNTANT,TECHNICIAN
	Pat Pringle	ANALYST	DOCUMENTER,TECHNICIAN
	Nat Nolan	ANALYST	TESTER,TECHNICIAN

See how the same search produces a much shorter list of people when you refine it, here by indicating the resource must not be based in London.

Add Resource

Enter criteria for the resource you want to add and click Find Now.

Find Now

OptionsCancel

Name:
(any)

Skill:
Must beANALYST

Location:
Must not beLondon

Role:
Prefer(any)

Languages:
Prefer(any)

Grade:
Prefer(any)

Include: Available and busy resources

AssignShow Assignments

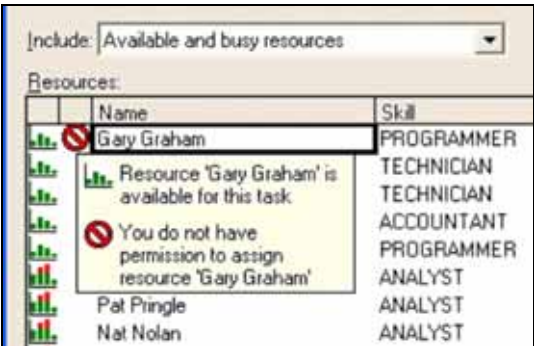
Resources:

	Name	Skill	Other Skills
	Harry Hunt	ACCOUNTANT	ANALYST,PROGRAMMER
	Reg Ring	ACCOUNTANT	DOCUMENTER,ANALYST
	Nat Nolan	ANALYST	TESTER,TECHNICIAN
	Fran Gold	TESTER	ANALYST,TECHNICIAN
	Sam Smith	PROGRAMMER	TECHNICIAN,ANALYST
	ANALYST	ANALYST	

Each resource listed has a red, green or red and green icon next to their name.

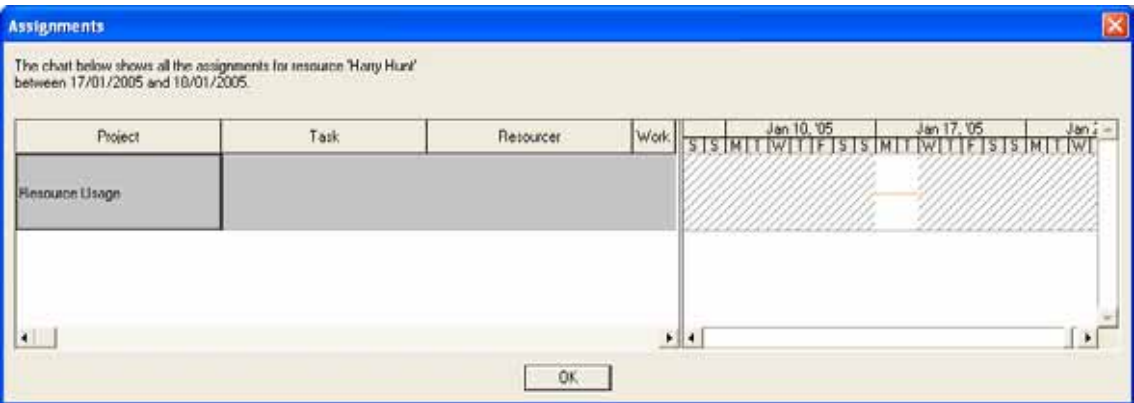
- The green icon indicates that the person is available to work on the task.
- The red and green icon indicates the person is busy, but there might be some availability.
- The red icon indicates the person has no availability – you’ll always see this against a zero-availability generic resource. It can indicate when a resource is unavailable because he or she does not work on those days, has left or has not yet joined the organisation or is on leave.

Note: if you do not have permission to assign a resource, you’ll see this indicated in the Add Resource dialog and a flag icon appears instead of the status button in your plan.

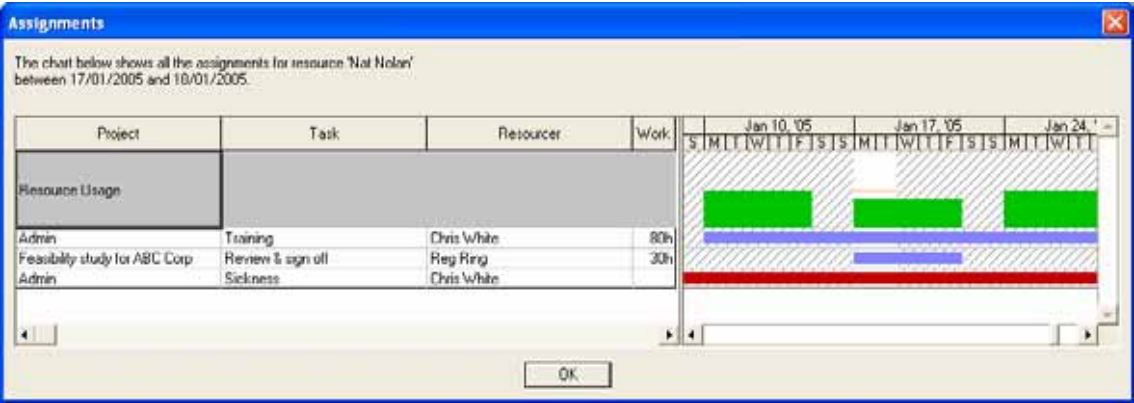


The Show Assignments button displays a graph of the resource’s commitments so you can see if the person has any availability when their icon shows they are busy.

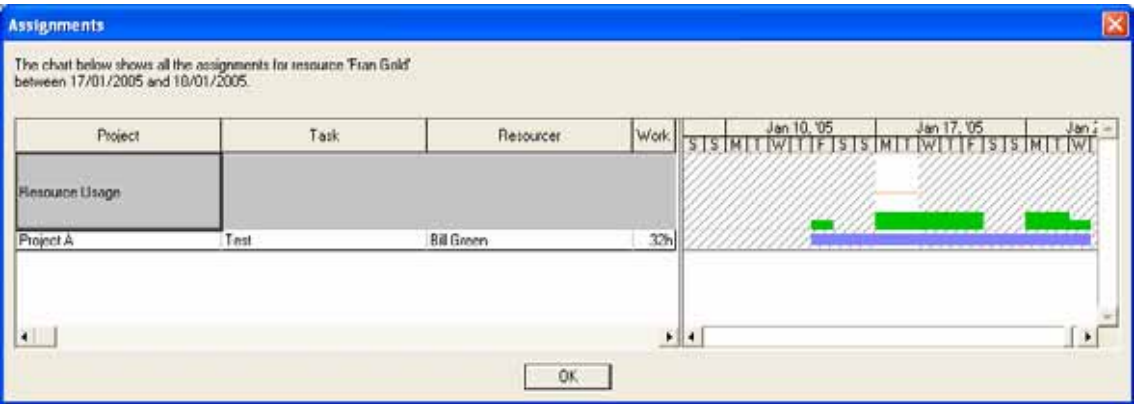
Harry Hunt’s icon is green, indicating that he’s available to do the work. Below is his Show Assignments graph. The brown line indicates Harry’s availability and the white, unshaded area shows the task’s scheduled duration.



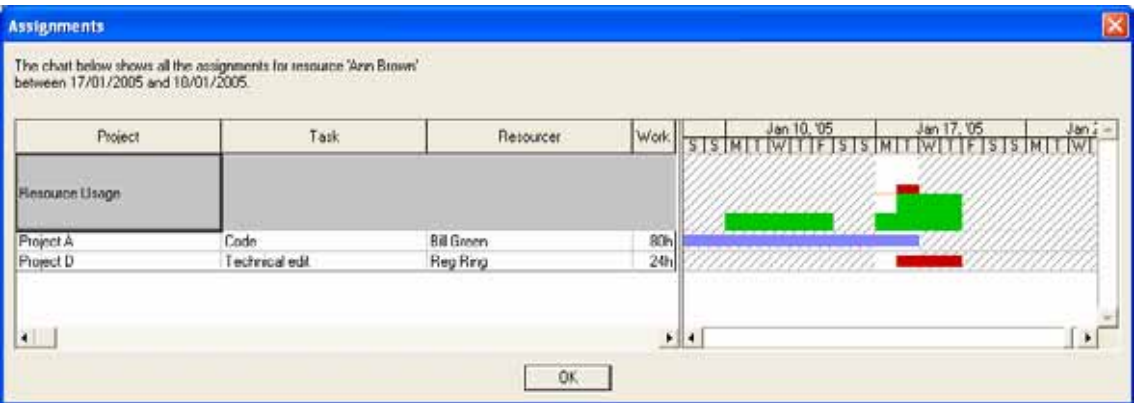
Nat Nolan is busy, but he has some availability, as the gap between the orange line and the green graph shows on his Show Assignments graph, below. However, the red horizontal bar indicating Sickness denotes that he’s probably unavailable to work on this task.



Fran Gold is only 50% available because she's working at 50% on Project A for Bill Green, as the blue bar shows, below.



Below is an example of Ann Brown's assignments graph (for the same task – found with the Skill search on TESTER), showing that the Technical edit task is overloading her on the Tuesday. She's working 50% on the Code task in Project A, which finishes at 12 o'clock on Tuesday, 18 January, but she's still scheduled to work extra hours to complete a day's work on the Technical edit task.



Note that the resource name appears next to the task bar on the Gantt Chart when a resource is assigned. Sometimes this is not displayed in full until you close the Resource Manager dialog.

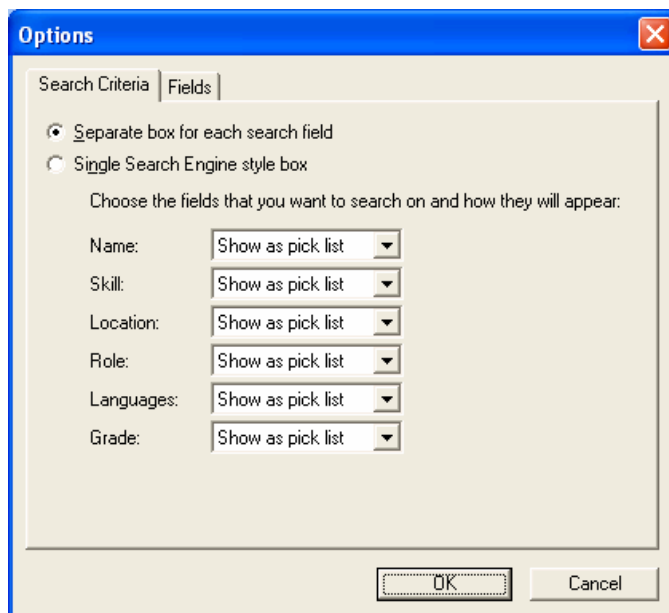
Changing the Add Resource dialog

It is good practice not to use a person's name in the search for a resource. This is because each person has a unique name and, ideally, you are searching by resource skills or other attributes which are then recorded in the database. There is only one Bill Green and you may not always remember why you assigned him to a particular task.

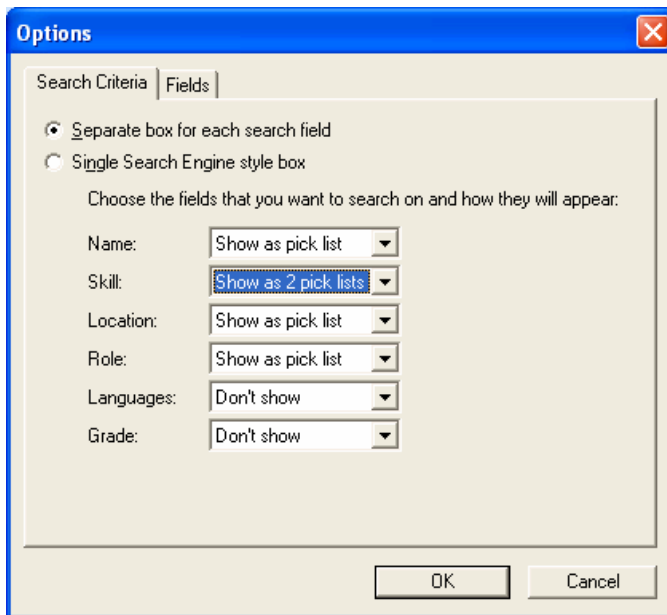
The criteria used for your search are saved so they can be used again if the person needs to be replaced. You or the resource manager can perform the same search again without having to remember it and this also saves time and enables someone else to know why the person was required for that task.

Follow these instructions to customize the fields on the Add Resource dialog:

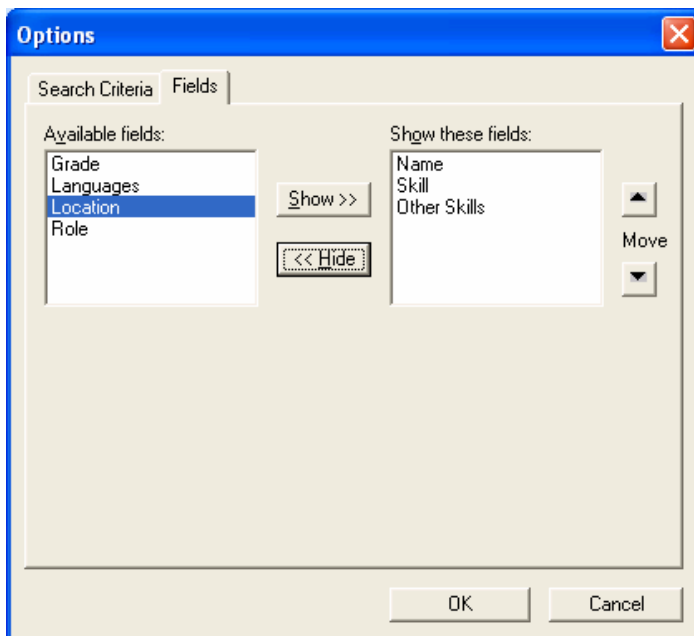
- 1 Open the Resourcer and, in the Add resource dialog, click the Options button.



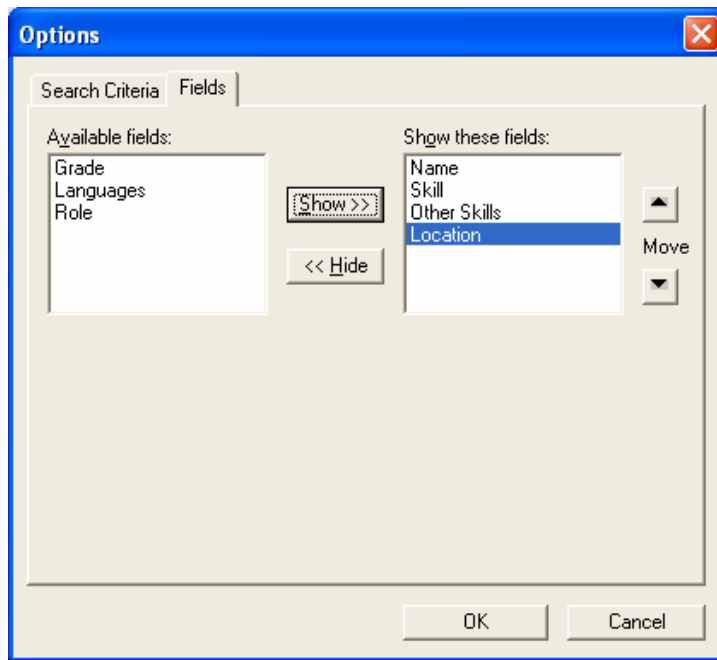
- 2 Click the Search Criteria tab and choose how you wish to see and use the search fields.



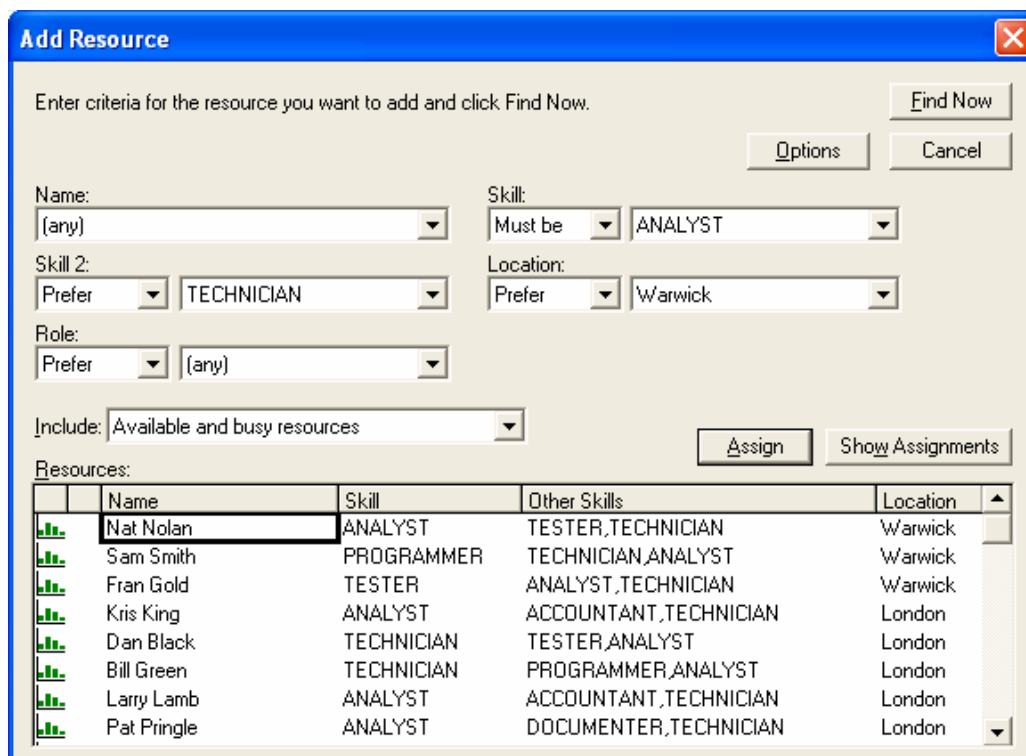
- 3 Click the Fields tab to choose which fields are displayed for the resources found by the search.



- 4 Use the Show and Hide buttons to select which fields are displayed and use the Move buttons to arrange their order, from left to right.



- 5 Click OK and note that your changes have the expected results: if they do not, repeat these steps.














Above, you can tailor the Add Resource dialog to show only the search fields you most commonly use and to display the data that enables you to select the best matched person. The Location field has been added to the display and two pick lists for the Skill field enable you to tune your search criteria more exactly.

Remember that the best match is at the top of the list of resources selected.

Understanding the indicator buttons

Innate Resource Manager uses the task field Text29 to show a coloured indicator button which represents a text value. The colour of the button shows the status of the resource assignments on the task.

11			Document module
12			Read specifications
13			Design documentation
14			Write documentation
15			Edit documentation
16			Technical edit
17			Quality edit
18			Designer review
19			End Project

You may sometimes see a small flag icon which indicates that you do not have permission to assign this resource.

13		
14		
15		

The task button's colour signals the status of the assignments on the task to the project manager so any issue can be identified easily. If there are three assignments on a task, for example, two green and one red, the task's button will be red so the project manager knows there's an issue to be resolved on that task.

Here's what the colours indicate:

- Red – one or more resources are not available, busy or not found.
- Green – all resources assigned to the task are OK (not overloaded), or no resources are assigned.
- Yellow – a resource assignment has changed and the task has not been synchronized.
- White – a new assignment has been made and the task is not yet synchronized.
- Flag – you do not have permission to change the assignment of this resource.

Note that the button colour changes to red or green only when you close the Innate Resource Manager dialog or when you synchronize with the database.

When a resource is in your plan but not found in the database, the button is always red, however, if you are using a resource in your plan which is not intended to be included in the Innate Resource Manager System, this can be acceptable.

Typically you are aiming for a plan with all green buttons.

	I	Task Name
1		<input type="checkbox"/> Draft Plan
2		<input type="checkbox"/> Program module
3		Functional specification
4		<input type="checkbox"/> Review
5		Circulate draft
6		Review meeting
7		Modify document
8		Design specification (1)
9		Design specification (2)
10		Code

When you assign a resource using the Add-in, the resource name is saved in the project file. You can look at the view Resource Sheet to see the resources used in your project.

If you wish, when you have assigned a generic resource once in your project, you can use the Microsoft Project Assign Resources dialog to assign the same resource to several tasks, as you would normally. This action usually causes the indicator button to become white. You must synchronize the plan with the database when you have finished and before closing the project.

Below, the project manager changed the duration of the task, Design specification (1), causing the indicator to become yellow and the status of the resource to become Changed. Resolve this by synchronizing the plan.

The screenshot shows a Microsoft Project task list on the left and a Gantt chart on the right. In the task list, task 8, 'Design specification (1)', has a yellow indicator button. The 'Innate Resource Manager' dialog box is open in the foreground, showing the task 'Design specification (1)' and the current resource 'Harry Hunt[50%]' with a status of 'Changed'. The dialog box has buttons for 'Previous', 'Next', 'Add New...', 'Replace...', 'Remove', 'Close', and 'Assignments'.

Task ID	Indicator	Task Name	Duration
4		<input type="checkbox"/> Review	8 days
5		Circulate draft	4 days
6		Review meeting	1 day
7		Modify document	3 days
8		Design specification (1)	8 days
9		Design specification (2)	3 days

Below, the same task after it has been synchronized, showing a green button.

6		Review meeting	1 day	
7		Modify document	3 days	
8		Design specification (1)	8 days	
9		Design specification (2)	3 days	

A red indicator button means that the resource is busy or overloaded or unavailable. The Summary task's indicator reflects that one or more of its tasks has a red button.

Milestones and other tasks with no resources assigned have green buttons.

If you use Microsoft Project to assign resources, typically the buttons are white until you synchronize. Note that, using any method to assign resources in Microsoft Project is not prevented by the Add-in, however there is no guarantee of your resources' availability. There is also no record of your search criteria saved in the resource database, so you must remember why you selected that person if you wish to replace him or her. You must remember to synchronize the plan. Recommended practice is to use the Add-in to assign resources.

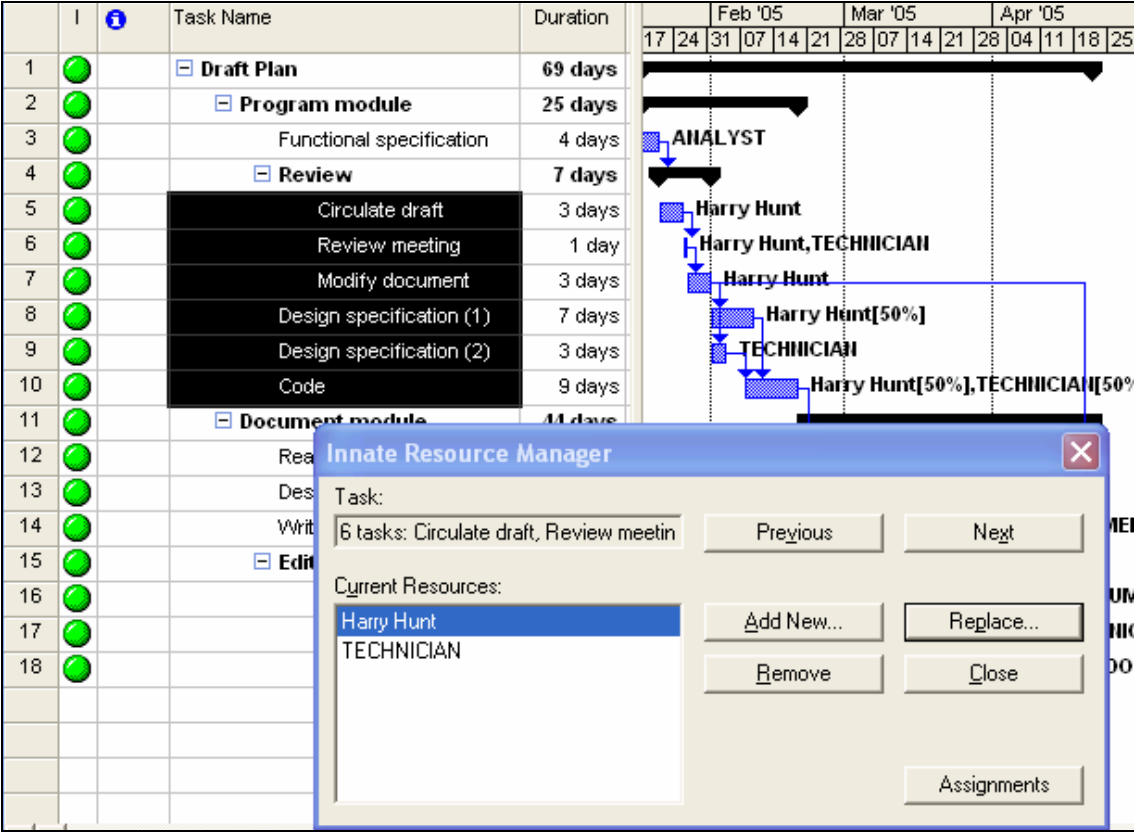
Assigning a resource to multiple tasks

You can assign the same resource to several tasks in one operation:

- 1 In the Gantt Chart table, select all the tasks to which you want to assign the same resource.
- 2 Click the Resourcer button in the Innate toolbar. Click Add New.

The screenshot displays the 'Innate Resource Manager' dialog box. The 'Task:' field lists six tasks: 'Circulate draft', 'Review meeting', 'Modify document', 'Design specification (1)', 'Design specification (2)', and 'Code'. The 'Current Resources:' list contains 'ANALYST' and 'TECHNICIAN'. The dialog includes buttons for 'Previous', 'Next', 'Add New...', 'Replace...', 'Remove', 'Close', and 'Assignments'. The background shows a Gantt chart with tasks like 'Draft Plan', 'Program module', 'Functional specification', 'Review', 'Circulate draft', 'Review meeting', 'Modify document', 'Design specification (1)', 'Design specification (2)', 'Code', and 'Document module'.

- 3 Select the search criteria as before and click Find Now.
- 4 Choose the resource to be assigned. Click the Assign button.
- 5 Click Close and check the Gantt Chart to make sure you have the expected results.



The 'Replace Resource' dialog box is shown. It has a 'Replace:' section with 'Group:' and 'Resource: ANALYST'. There are 'Find Now', 'Options', and 'Cancel' buttons. Below are dropdown menus for 'Name:' (any), 'Skill:' (Must be, ANALYST), 'Location:' (Must be, York), 'Role:' (Prefer, any), 'Languages:' (Prefer, any), and 'Grade:' (Prefer, any). An 'Include:' dropdown is set to 'Available and busy resources'. At the bottom, there are 'Assign' and 'Show Assignments' buttons. A table titled 'Resources:' shows columns for 'Name', 'Skill', and 'Other Skills', with the message 'No resources match the search criteria'.

Note that when no resources are found to satisfy the search criteria, you'll see a message to tell you this, as shown in the previous illustration.

Change your search criteria, if that's possible, and try again.

Tips for project managers using Microsoft Project

It is good practice not to leave blank rows in your plan: if you do, they can sometimes be given a duration accidentally and this can lead to confusion.

Ensure that you have the correct logical relationships/dependencies/links between tasks. If you use deadlines and constraints, check that these are still as expected after you have updated from the web. If necessary, update these dates manually.

Use only the generic resource names in the Innate Microsoft Project Template plans.

When you are assigning named resources to a plan, make sure you use the name for that resource as it appears in Innate. It's best to choose the name using the Add-in. If you wish to use Microsoft Project's pull-down list or Assign Resource dialog (after the resource names have been used at least once already in your plan) take care not to mis-spell names and make sure you always synchronize your plan afterwards. You need never type in a resource name.

Replacing a resource

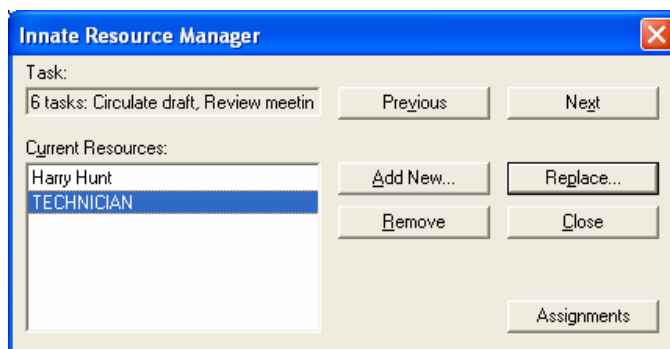
Replacing a resource means that a different resource is assigned instead of the original resource, usually – but not necessarily – with the same hours of work at the same time as the original resource.

Note that, if you are searching for an individual resource name, you may not be able to replace the person with another named resource if there is no match available.

Follow these steps to replace the resource using the Add-in:

- 1 In the Gantt Chart, choose one or more tasks on which you want to replace the (same) resource.
- 2 Click the Resourcer button on the Innate toolbar.
- 3 Click the Replace button. Note that the search is repeated automatically using the original criteria.
- 4 Choose the new search criteria and click the Find Now button.
- 5 Select the resource you wish to use and click the Assign button.
- 6 Click the Next, Previous or Close button.

Note that if you have selected several tasks which have different resources already assigned to them, you must choose each resource name in turn and perform the replace operation for each one.



Adding progress to your plan

You can add value to your project plan by tracking progress, that is, what work has been completed and what work remains incomplete.

You can track progress and changes by entering them in your plan yourself – it can be most accurate to do this using Actual Work and Remaining Work in the assignment records – or you can use Innate Project Progresser to update tasks and assignments automatically with data collected from Innate Timesheets.

Remember that synchronizing from the web brings updates to remaining work only. Actual hours worked are not changed: they are stored in your plan and represent an historical record of what has taken place.

Be very careful, if you are updating tasks manually, that you do not change the actual work of a task. It is a good idea not to use the % Complete task field to update your tasks unless they have been completed exactly as planned because otherwise your actuals might be changed (by Microsoft Project's calculations) and your plan becomes historically inaccurate..

If your plan has milestones (zero duration tasks), you must remember to track the milestones, too. When the milestone is complete you can set its % Complete value to 100%: use the Task Information dialog General tab or the 100% button on the tracking toolbar to do this. Project Progresser only adds progress to normal tasks, not to summary tasks or milestones.

You may find the Microsoft Project help provides useful guidelines and information about the updating fields and calculations.

Using Project Progresser for updating

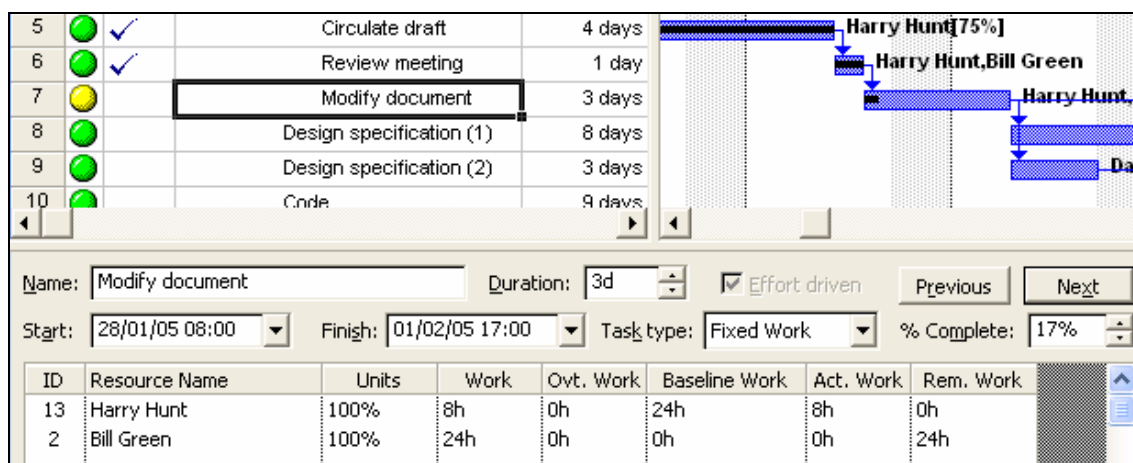
Here's the recommended cycle of actions for organisations where the project managers are using Innate Project Progresser:

- 1 The project manager progresses the plan using Project Progresser.
- 2 The project manager synchronizes the plan, giving the resource manager an up-to-date version of the plan in the web database.
- 3 The resource manager uses the browser to make changes to resources in the database. During this time, ideally, the project manager should not use the Microsoft Project plan. When the resource manager's actions are completed, the project manager can be informed and the Microsoft Project plan can be used safely again.
- 4 The project manager opens the plan and uses the Add-in to Sync from web to accept the changes.

Replacing a resource assignment with actual work values

When progress has been added to your plan and a resource has started work on a task but cannot complete it, you can replace the resource with another person (or a generic) who is assigned to complete the work.

The following screen shows that Harry Hunt had completed eight hours of a 24-hour assignment. After updating this in the plan, the resource manager replaced Harry with Bill Green, who is to complete the remainder of the work. When the project manager synchronizes the plan from the web, Bill Green's hours show he has 24 hours' work to do, with no actual work (yet). Harry's assignment shows he's completed eight hours of actual work and has zero hours remaining.



If you are familiar with Microsoft Project's updating fields, you'll know that the work completed is called the actual work and the work still to be done is called the remaining work.

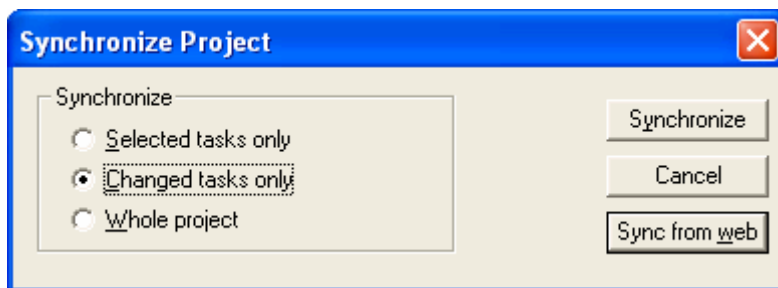
The field called work contains the total work, either for the assignment or, on the task record, for the whole task.

You can replace one resource on a task which has several assignments.

It is most important that you remember to synchronize your plan after you have updated the actual hours (using Project Progresser or by any other means). If you do not synchronize after the progress update, and if your resources are being replaced by the resource manager in the database, the new resource could be assigned to the whole of the work on the assignment and not to the remaining work.

Follow these steps to get an accurate replacement for a resource assignment after you have progressed your plan:

- 1 Save your plan after you have applied the updates from Project Progresser.
- 2 Click the Synchronize button on the Innate toolbar. Choose Changed tasks only or Whole Project.



- 3 Click Synchronize.

The resource manager can see only the remaining hours for the original assignment until he or she refreshes the screen being used for changing assignments, usually Manage Work. After refreshing the screen the resource manager can see only the remaining hours so these are used in the search for a replacement resource with skills matching those of the original worker.

Note that, if your resource manager is viewing this assignment on the web browser as you progress the project and synchronize it, the resource manager must refresh the page in order to see the new remaining work.

After the resource manager has replaced the resource and saved the change in the database, you must synchronize your plan from the web, as follows.

- 4 Open the Synchronize dialog again and click Sync from web.

Synchronize Web Changes

The checked changes in the list below will be made when you click Apply. Note that if you apply any changes that move a task, other tasks in your plan may be affected.

Apply Cancel

Apply?	ID	Task	Was	Replaced with
<input checked="" type="checkbox"/>	12	Read specifications	Bill Green[26h]	Fran Gold[26h]

5 Click Apply. Review the changes in the plan.

ID	Resource Name	Units	Work	Ovt. Work	Baseline Work	Act. Work	Rem. Work
2	Bill Green	100%	22h	0h	48h	22h	0h
6	Fran Gold	100%	26h	0h	0h	0h	26h

6 Click Synchronize to change the button of the changed task from yellow to green

Above, the Task Form in the split screen shows that Bill Green worked for 22 hours out of a planned 48 hours and he's been replaced by Fran Gold who's going to work for the remaining 26 hours. Bill's remaining work is zero.

Note that you see all the resources' names listed on the bar in the Gantt Chart.


ID	Resource Name	Work	R/D	Leveling Delay	Delay	Start	Finish
2	Bill Green	22h		0d	0d	22/02/05 08:00	24/02/05 15:00
6	Fran Gold	26h		0d	2.75d	24/02/05 15:00	01/03/05 17:00

You can see the start and finish dates of the resources' assignments in the Resource Schedule form. The delay of 2.75 days is from the start of the task to Fran's assignment start and is calculated by Microsoft Project.

Using other views in Microsoft Project

You can change the view in Microsoft Project by opening the View menu and choosing a view, or by clicking More Views on the same menu and choosing from a longer list of pre-defined views.

The Resource Sheet view, below, lists all the resources used or saved in your project file. Resources which have been replaced may still remain in the list, even after they are no longer assigned to any tasks.

		Resource Name	Type	Material Label	Initials	Group	Max. Units
1		Ann Brown	Work		A	DOCUMENTER	100%
2		Bill Green	Work		B	TECHNICIAN	100%
3		Chris White	Work		C	PROGRAMMER	100%
4		Dan Black	Work		D	TECHNICIAN	100%
5		Ed Gray	Work		E	PROGRAMMER	100%
6		Fran Gold	Work		F	TESTER	100%
7		Will Williams	Work		W	TESTER	100%
8		DOCUMENTER	Work		D	DOCUMENTER	100%
9		TECHNICIAN	Work		T	TECHNICIAN	100%
10		PROGRAMMER	Work		P	PROGRAMMER	100%
11		TESTER	Work		T	TESTER	100%
12		ANALYST	Work		A		100%
13		Harry Hunt	Work		H		100%
14		Gary Graham	Work		G		100%
15		Vera Verity	Work		V		100%

It's useful to check the resource list to make sure there are no duplicate or mis-spelled resources. If you find any names that are wrong, check they are not assigned to any tasks. If they are assigned, you should replace the incorrect resources with the correct name using the Add-in.

Use the Using resource filter to find tasks using incorrect resources and replace them all in one action.

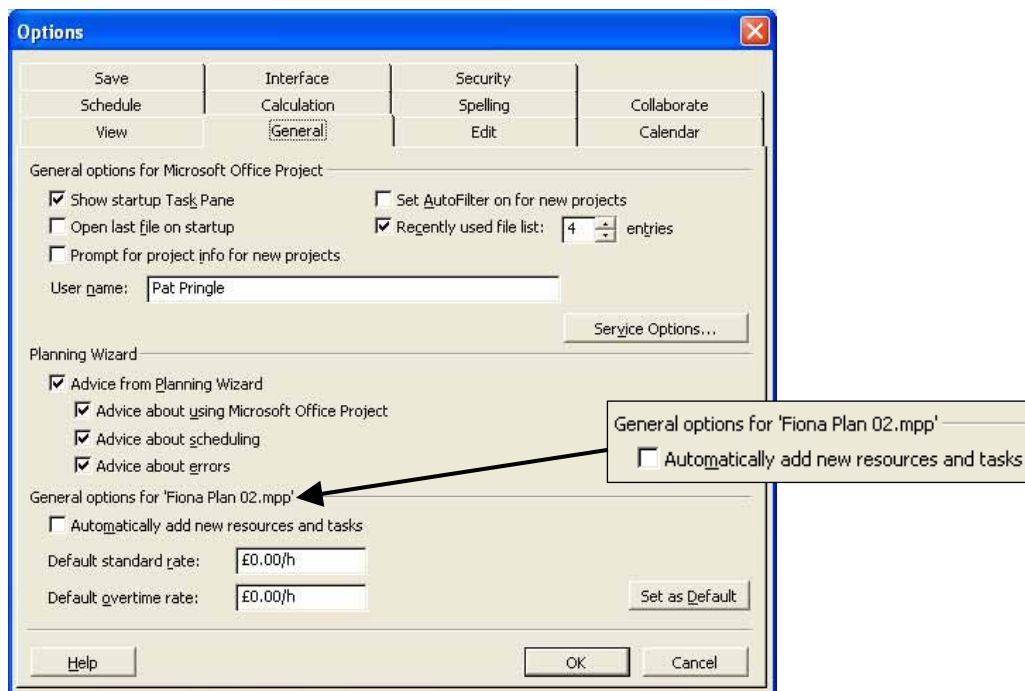
The Resource Usage view, below, enables you to see who is assigned to the tasks in your project and when they are doing the work. Use the zoom in and zoom out buttons to see more or less detail against the timescale. Remember that you are only seeing people's work on this project.

	Resource Name	Work	Details	Qtr 1, 2005			Qtr 2, 2005	
				Jan	Feb	Mar	Apr	
1	<input checked="" type="checkbox"/> Ann Brown	80 hrs	Work		32h	16h	32h	
	<i>Read specifications</i>	48 hrs	Work		32h	16h		
	<i>Technical edit</i>	12 hrs	Work				12h	
	<i>Designer review</i>	16 hrs	Work				16h	
	<i>Collate all documentation</i>	4 hrs	Work				4h	
2	<input checked="" type="checkbox"/> Bill Green	8 hrs	Work	8h				
	<i>Review meeting</i>	8 hrs	Work	8h				
3	<input checked="" type="checkbox"/> Chris White	4 hrs	Work				4h	
	<i>Collate all documentation</i>	4 hrs	Work				4h	
4	<input checked="" type="checkbox"/> Dan Black	56 hrs	Work		24h	32h		
	<i>Design specification (2)</i>	24 hrs	Work		24h			
	<i>Design documentation</i>	32 hrs	Work			32h		

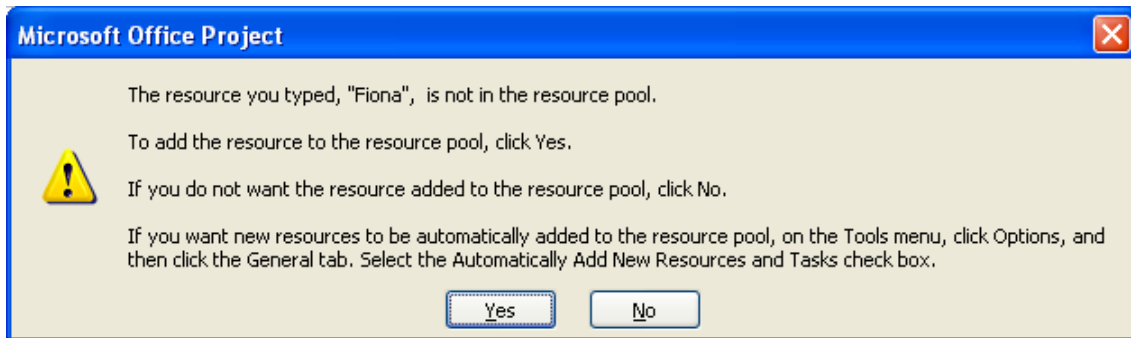
Microsoft Project's resource management features

Note that you still have the full functionality of Microsoft Project's resource management, reporting and assignment features. You can use resource levelling in Microsoft Project and you are able to use its Assign Resources dialog, but you must always synchronize resources with the database after changing any assignments or tasks.

It's a good idea to switch off the Tools menu, Options, General tab setting, "Automatically add new resources and tasks", by making sure that the checkbox is blank, as shown below. Click the Set as Default button to save this setting for the next time you use Microsoft Project.



When this option is switched off, if you use Microsoft Project to add a resource which is not already in the resource list or type a new resource name instead of using Innate Resource Manager, you'll see a warning dialog, as follows:

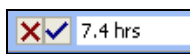


Click No and assign the resource using the Innate Resourcer.

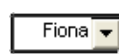
Trouble-shooting

“Method not available” – when the Entry Bar is open or a cell is being edited

Make sure that, when you use the Innate Resourcer to assign, replace or remove a resource, the entry bar is not open – and you aren't editing a cell.

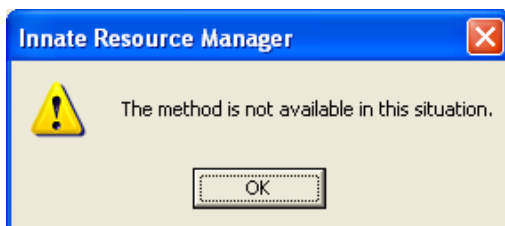


(left) The Entry Bar is open



This cell is being edited

If the entry bar is open, the search works (for Add New and Replace), but when you click the Remove or the Assign button, you can't assign any resource and you will see the following dialog:



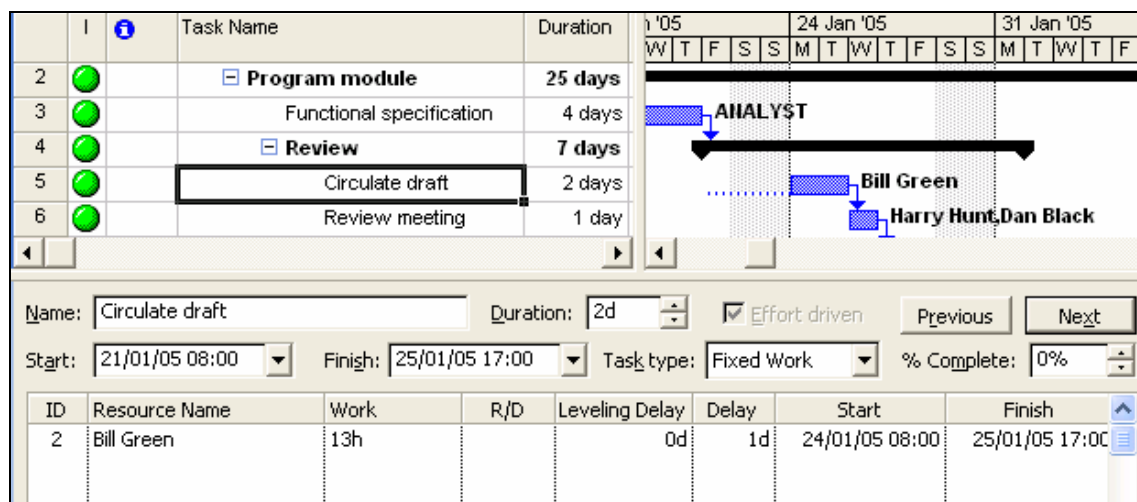
Resolve this as follows:

- 1 Click OK on the information dialog, and close the Add Resource or Replace Resource dialog by clicking the Cancel button.
- 2 Close the Innate Resource Manager dialog.
- 3 Close the Entry Bar or close the cell.
- 4 Click the Resourcer button and try your operation again.

A dotted line has appeared at the beginning of a task in the Gantt Chart after I synchronized from web.

In this case, task 5 was originally a three-day duration task for an ANALYST, with 24 hours work, starting on Friday 21 January. The generic ANALYST was changed in the web database for Bill Green, who's so efficient he can complete the task in just 13 hours, however, he's not available to start the task until Monday, 24 January.

A dotted line indicates a split in a task and, if a resource assignment has been changed and the person can't start work at the task Start date, a delay is entered for the assignment. The delay is the amount of working time between the task Start date and the resource assignment Start date, as shown in the example below.



Note: you can replicate this dual pane or split view in Microsoft Project: follow these steps:

- 1 When you are in the Gantt Chart view, open the Window menu and choose Split.
- 2 Right-click in the lower pane, the Task Form view, and choose Resource Schedule.
- 3 Choose a task in the Gantt Chart to see its details in the Task Form.

When I move a task and synchronize, a flag indicator appears against the task.

This happens when you do not have permission in Innate Resource Manager to assign the resource. You cannot change the amount of work or the work profile in the database if you do not have Assign permission for this resource, so the flag appears in your plan to indicate this.

Contacting Innate

Thank you for reading this User Guide. If you wish to contact an experienced Innate consultant, please call, email or fax.

Support from Innate

Please refer to the list below for your local Innate office where you can get support and further information. Telephone support is available during office hours.

See also **Innate's** web site at www.innate.co.uk for the latest product information and contact details.

	<i>Telephone</i>	<i>Fax</i>	<i>Email</i>
Support UK	08456 123 153	08700 522 034	support@innate.co.uk
Sales UK	08456 123 145	08700 522 034	sales@innate.co.uk
Support US	888 966 4668	888 966 4669	support@innate.co.uk
Sales US	888 371 3350	530 685 4467	sales@innateus.com